ADVISING TRAINING SESSION

Workday Student at Santa Clara University

Agenda

- Meet the Team
- Training Session Format
- Key Terms and Dates
- Process and Demo
- Hands-on activity
- Questions

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Meet the Training Team

Name	Role
Garrison Dyer	Associate Dean, Academic Support Services, Drahmann Center
Juan Peralta	Technology Coordinator, Drahmann Center
Carol Liu	Senior Data Analyst, Office of the Registrar
Lisa Jocewicz	Director of Graduate Programs, School of Engineering
Dora Khuu	Senior Data Analyst, Office of the Registrar

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Goals of Training

To learn the following Advisor tools and tasks in Workday:

- The Student Profile
  - Ability to generate a PDF of the student's record
- Academic Progress Report

- Academic Program Plan

- Student Notes

- Advising Cohorts

- Evaluate Academic Requirements

 *Access to certain tasks may be limited

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Training Session Format

Questions	Outline	Resources
Ask questions throughout	Process Overview	Step-By-Step Guides
Parking Lot	Demo	Drop-in Sessions
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Key Changes

- PeopleSoft- major GPA calculated from a customized course list.
  - Workday- courses that count toward degree requirements will be calculated toward the POS GPA.

- PeopleSoft Pathways are programmed as courses and units.
  - Workday Pathways are only units.

- Department Admins/Managers will manage student advisor cohort.

- PeopleSoft- Registrar's office will initiate the academic requirement overrides.
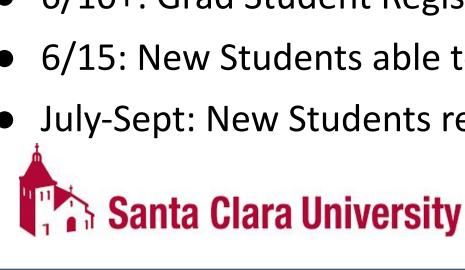 - Workday departments will initiate the process.

Key Changes

- The Degree Audit is now called the Academic Progress Report. It will only update on the following triggers:
  - assign student grades
  - change student grades
  - override academic requirement
  - override requirements effective date
  - transfer credit evaluation
- Academic Progress Report nightly updates include:
  - add program of study, change primary program of study
  - matriculation
  - registration (add, drop, and withdraw)
  - remove program of study
- Glossary of Workday terms, and how they contrast with PS, will be available.
- The Workday notifications vs inbox icons!
- Workday is different from PeopleSoft/eCampus: it will take time to become familiar with the new functionality and processes; and lots of improvements will be needed

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KEY DATES

- 3/6: Workday Student is Live!
- 3/20: JST Students invited to complete onboarding.
- 4/17: Undergrad Students invited to complete Fall Registration Checklist.
- 4/3-4/14: JST Student Registration.
- 4/24-5/5: Undergrad Mandatory Advising.
- May: Law Students invited to complete onboarding.
- 5/8-5/19: Undergrad Student Registration.
- June: Grad Students invited to complete onboarding.
- 6/5-6/9: Law Student Registration.
- 6/10+: Grad Student Registration
- 6/15: New Students able to login to Workday.
- July-Sept: New Students register in Workday.

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- *View Student Profile*
  - Generating a PDF of the student's profile
- Overview of the *Academic Progress Report*
  - How to filters
  - How to generate a PDF
- Managing Cohorts
  - Add/remove students from a cohort
  - View student support network
- *Evaluate Academic Requirements for Studen*t for different Programs of Study
- SCU STU Record Reports Dashboard

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QUESTIONS?

Please go to https://www.scu.edu/technology/get-help/

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Meet the Training Team

Name	Role
Adora Hoose	Senior Technical Specialist, Office of the Registrar

Goals of Training

To learn the following tools and tasks in Workday:

- Edit, View, and Cancel course sections.

- View course sections

- View Course Rosters

*Access to certain tasks may be limited

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Key Changes

PeopleSoft	Workday
All changes to course sections done by Registrar's Office	Departments will have access to make updates to published Course Sections

- Glossary of Workday terms, and how they contrast with PS, will be available.

- The Workday notifications and inbox icons should be checked daily!

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- Updates to published course sections

- View course rosters
  - RPT0171 SCU STU CUR Class Roster report

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Carol Liu	Senior Data Analyst, Office of the Registrar
Dora Khuu	Senior Data Analyst, Office of the Registrar

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Goals of Training

To learn the following tools and/or tasks in Workday:

- Create academic requirement overrides on Academic Progress Report

- Identify when to use different override types

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Key Changes

- Department chairs will initiate the academic requirement overrides regarding major and minor requirements.

- The Core office will initiate the academic requirement overrides regarding core requirements.

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- Assign course to requirement type overrides
- Adjust course count
- Adjust units
- Waive requirement (1) regular requirement (2) non-course requirements

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Meet the Training Team

Name	Role
Adora Hoose	Senior Technical Specialist, Office of the Registrar

Goals of Training

To learn the following tools and tasks in Workday:

- ○ View course rosters, sections, and schedules
- ○ View Advisees
- ○ Assign grades
- ○ The Student Profile
- ○ Approving Prerequisite Override Requests

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Key Changes

- In Workday you can submit partial grades. Once a grade is submitted it is instantly posted and the student can view it.

- Course rosters have additional information (ex: student pronouns).

- When students submit requests for prerequisite overrides, the request will only go to the instructor to approve.

- Cannot email students using Workday from the course roster.

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- Searching for a student.
- Explore the *Student Profile.*
- Explore the *Teaching & Advising App.*
- Search for courses using STU Find Course Sections.
- Prerequisite Override Requests

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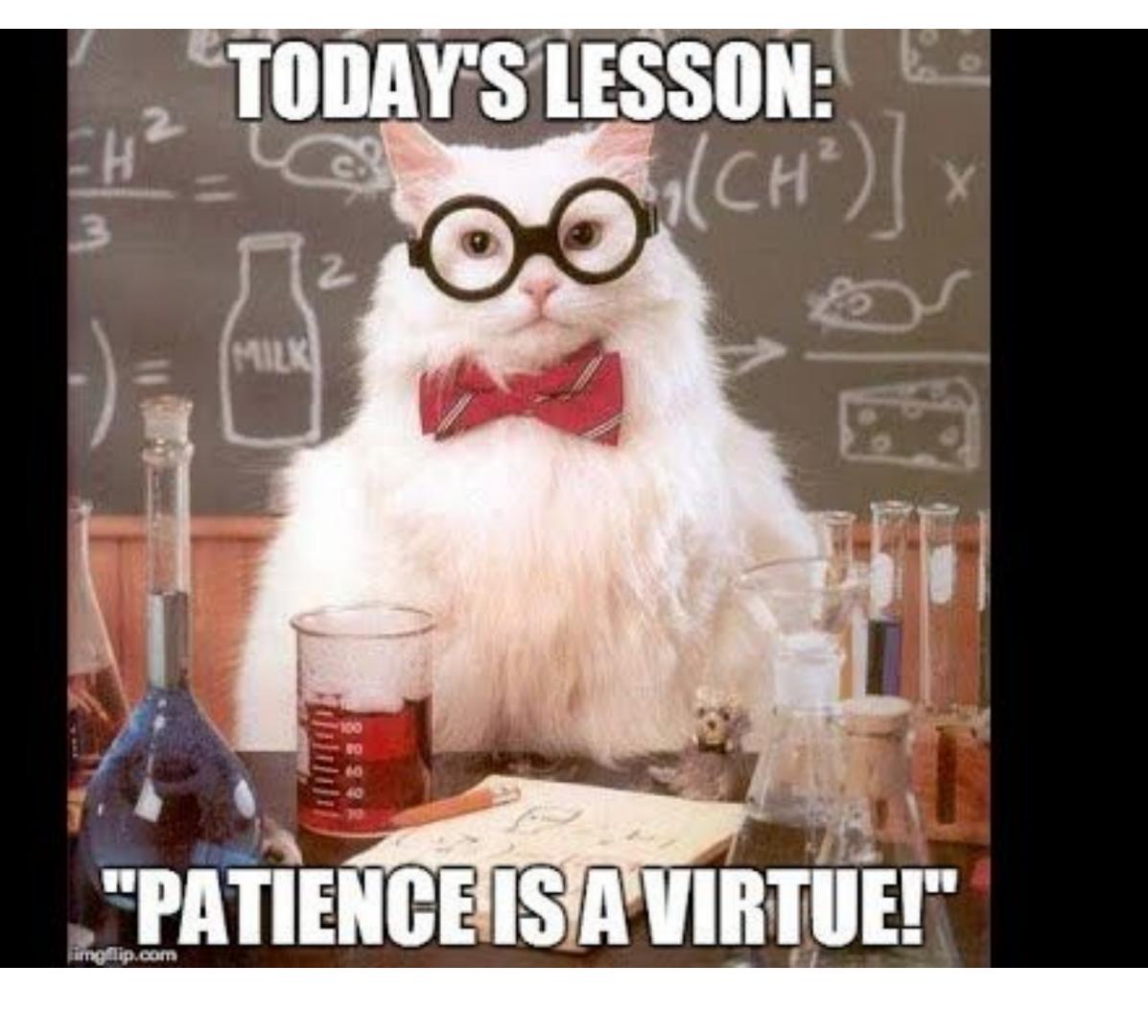| Name	Role
Mary Shenouda-Williams	Senior Associate Registrar, Office of the Registrar
Duane Voigt	University Registrar, Office of the Registrar

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Goals of Training

Learn:

- Basic management of student records*
  - Ability to generate a PDF of the student's record
- Registering and dropping classes
- To view unofficial transcripts
- To review transfer credit
- Evaluating academic progress and program completion
- Utilize resources available to you (eg. Quick Reference Guides (QRGs), Glossary of Terms, Menu, Favorites)
- and the last goal of training…

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Key Changes

- Permission numbers are no longer used. Instead they are called "Tokens".
  - Student request to override prerequisites will go to the instructor for approval.

- Department Admins/Managers will manage student advisor cohorts (there is a Cohort Management training session).

- Academic Progress report will only update on the following triggers:
  - assign student grades
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  - override academic requirement
  - override requirements effective date
  - transfer credit evaluation

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Key Changes

- Academic Progress report nightly updates include:
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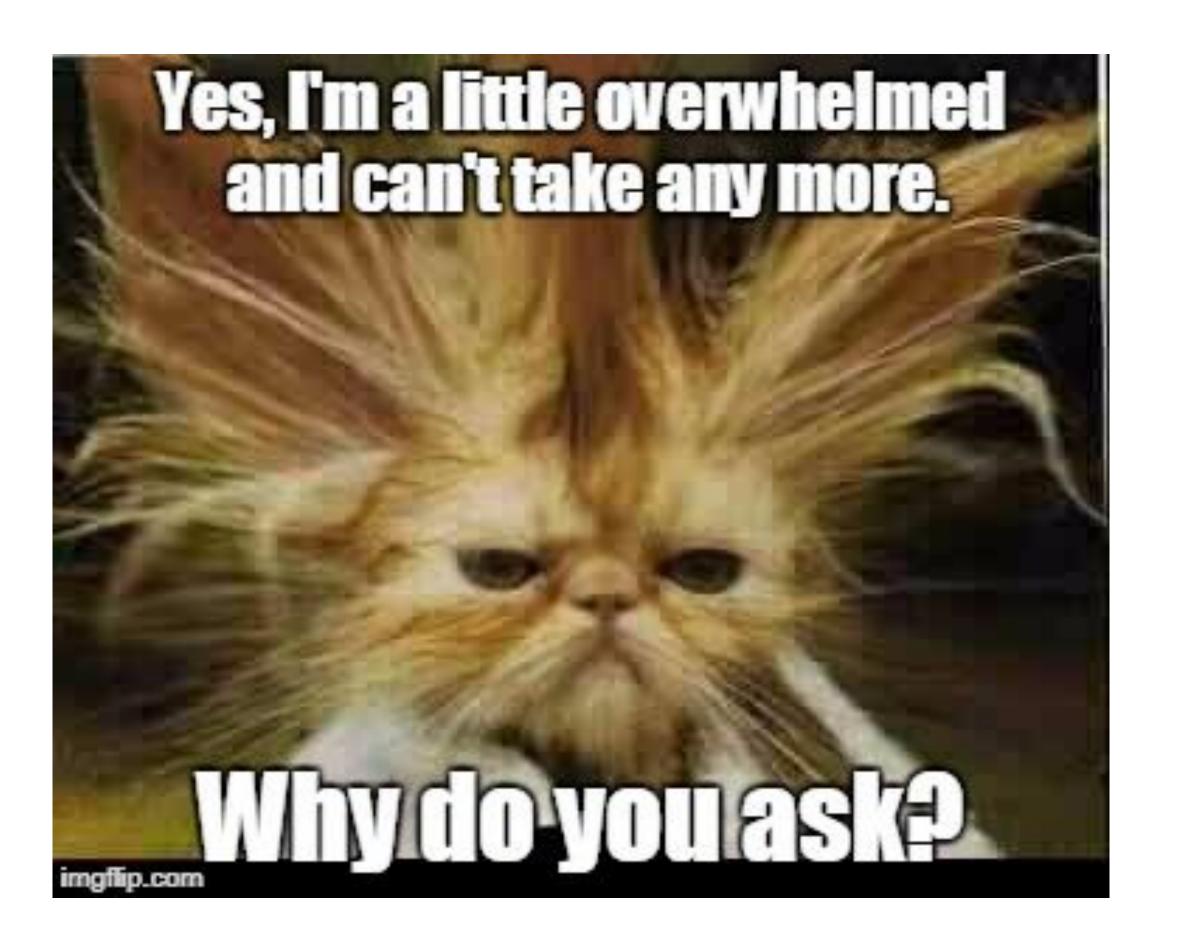- July-Sept: New Students register in Workday.

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